

California Student Aid Commission

Middle Class Scholarship (MCS)

Presented By:
California Student Aid
Commission





Agenda

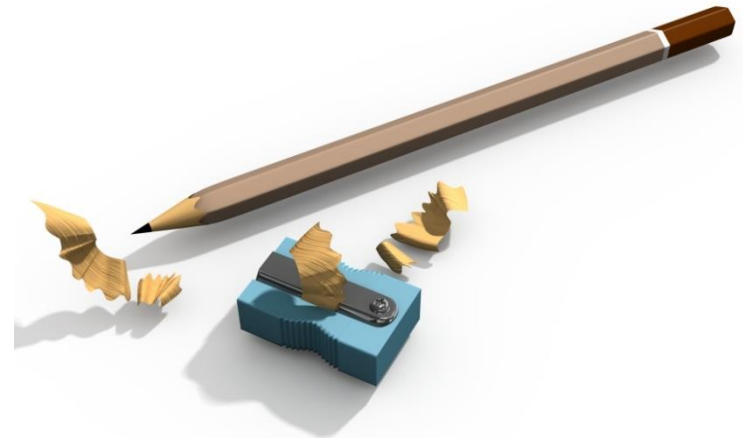
- MCS Timeline
- MCS Process
- Other Aid
- Initial Award Processing
- MCS Data
- MCS Processing
- Reports, Resources, Recommendations





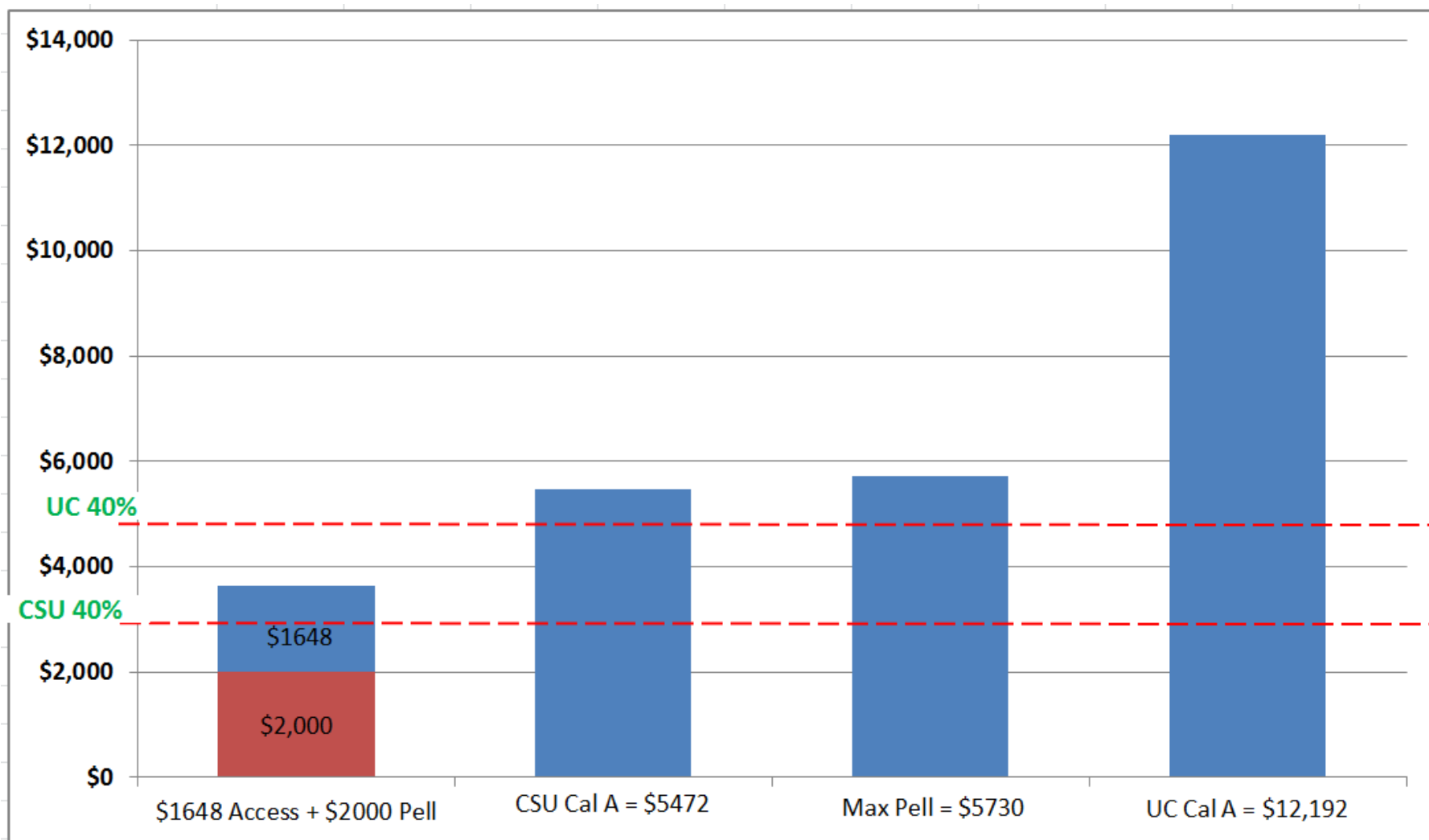
MCS Eligibility

- Phased in over 4 years
 - 2014-15 at up to 14%
 - 2015-16 up to 20%
 - 2016-17 up to 30%
 - 2017-18 up to 40%
- Undergrads with family incomes up to \$150,000
- UC and CSU only
- Covers up to 40% of system wide tuition and fees





MCS Thresholds





Middle Class Scholarship

Implementation



- 2014-15 - \$107m
- 2015-16 - \$152m
- 2016-17 - \$228m
- 2017-18 - \$305m
- 2018-19 -
- 2019-20 -



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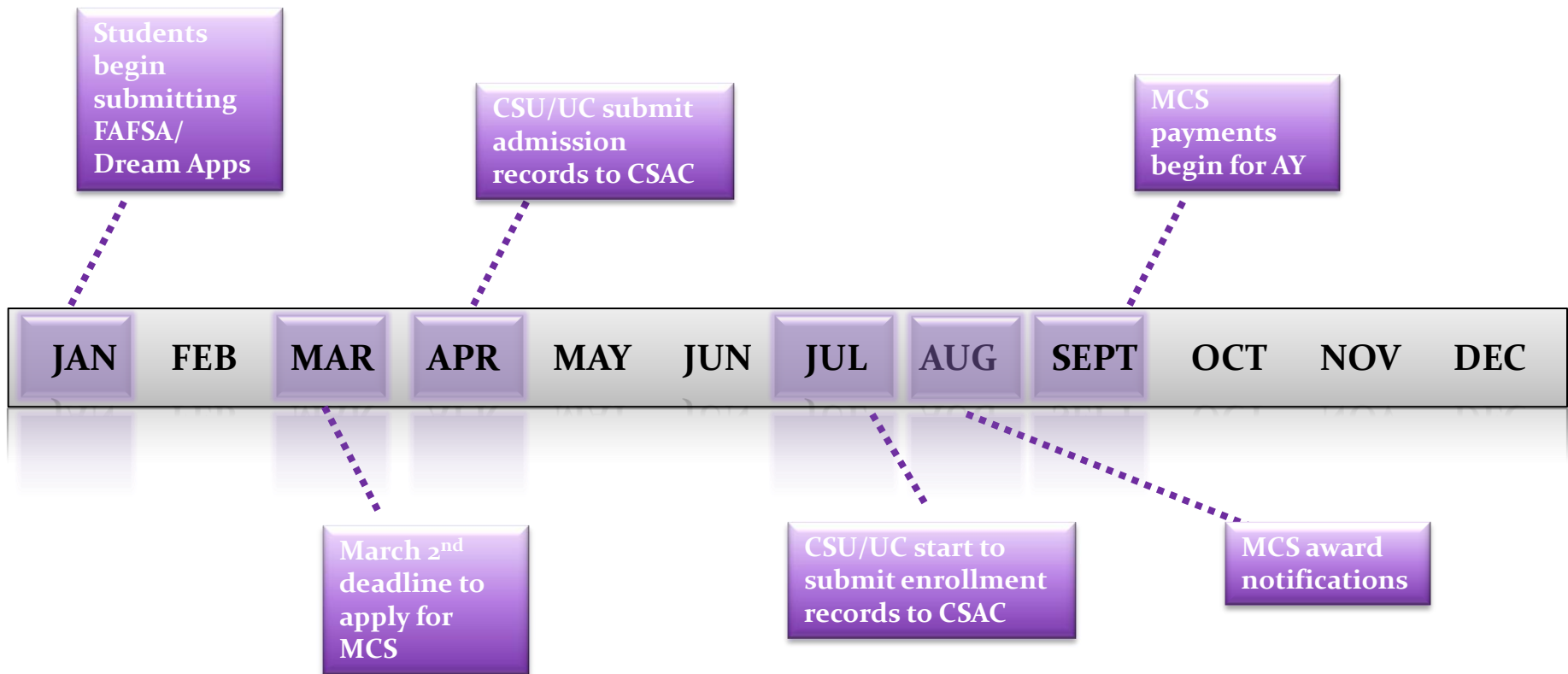
MCS Eligibility

- Earnings up to \$150,000
- Final award based on students eligible & funding allocated
- Eligibility determined after students awarded federal, state and institutional aid





Middle Class Scholarship



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Middle Class Scholarship

- Submit **Admission** records April 1
 - Data used for MCS budget projections
 - Students receive notification of potential eligibility
 - This year, we sent 157,170 notifications
- Submit **Enrollment** records starting July 1
 - Data used to determine award amounts
 - Eligible students are notified of award amount



Middle Class Scholarship

Enrollment File: Include new and continuing undergraduate students (including transfers) who...

- Have a total income of \$150,000 or less,
- Have completed an on-time FAFSA/Dream app,
- Are meeting SAP,
- Teacher Credential Students included



Enrollment File Layout

2014-2015 Admission/Enrollment MCS Record Layout

AMENDED COPY

Field #	Start	End	Length	Field Name	Valid Content	Justify Signed	Admission	Enrollment	COMMENTS
13	112	112	1	Grade Level in College as of the beginning of the award year	0 = 1st year, never attended college 1 = 1st year, attended college before 2 = 2nd year/sophomore 3 = 3rd year/junior 4 = 4th year/senior 5 = 5th year/other undergraduate 6 = 1st year graduate/professional 7 = Continuing graduate/professional	Left		X	Assuming this will be ISIR field #35 "Grade Level In College" found on ISIR/Cal ISIR transaction to be used for awarding? No, from campus record
14	113	113	1	Student's Dependency Status	1=Dependent 2=Independent	Right		X	Assuming this will be ISIR field #171 "Dependency Status" found on ISIR/Cal ISIR transaction to be used for awarding? ISIR Field #173 for 14/15
15	114	122	9	Total Income	-99999999 to 099999999	Right		X	Assuming this will be ISIR field #295 "Total Income" found on ISIR/Cal ISIR transaction to be used for awarding? ISIR Field #299 for 14/15
16	123	129	7	Student's Federal Awards	0000000 to 9999999	Right		X	Report zero here if this award amount was zeroed out by staff but report blank if award never existed/packaged? No blanks
17	130	136	7	Student's Institutional Grants and Fee Waivers	0000000 to 9999999	Right		X	Report zero here if all these award amounts were zeroed out by staff but report blank if award never existed/packaged? No blanks
18	137	143	7	Student's State Awards	0000000 to 9999999	Right		X	Report zero here if this award amount was zeroed out by staff but report blank if award never existed/packaged? No blanks

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FINANCIAL AID OFFSET AGAINST MCS

Federal Aid

- Pell Grant
- FSEOG
- Teach Grant
- BIA Grants



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FINANCIAL AID OFFSET AGAINST MCS

State Aid

- Chafee Grant
- Child Development Grant
- LEPD
- National Guard



Note: CSAC adds in Cal
Grant awards

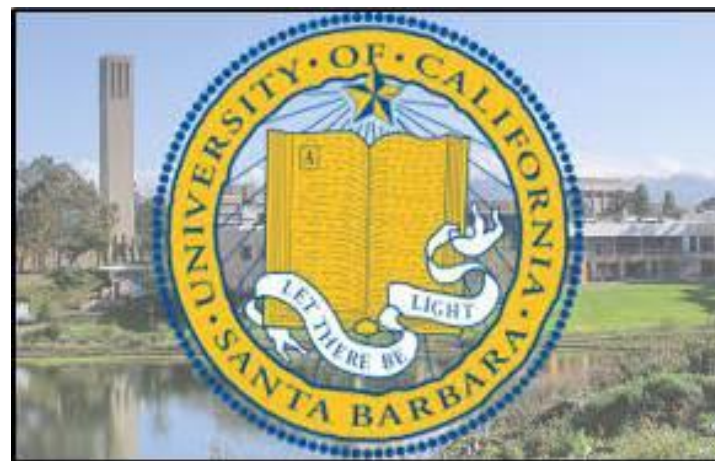
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FINANCIAL AID OFFSET AGAINST MCS

Institutional Aid

- Need-based grants
- EOP
- Fee Waivers (Alan Pattee)
- Portion of merit scholarship designated for fees
- Vet benefits and other fee waivers (voc rehab, etc.)





Initial MCS Award Offers

- 385,663 student enrollment records processed
- 72,931 students initially offered MCS
 - Additional 7,550 students pending verification
 - Additional 4,881 students have errors and mismatches to be corrected
- \$53,685,498 has been awarded to MCS eligible students



Considerations For Future Processing

300,301 Students received other forms of financial aid that make them ineligible for MCS

- **Good news:** Middle income students are receiving some forms of financial aid
- **Extended deadline:** no priority deadline for 2014-15
 - **Deadline for 2015-16 is MARCH 2nd, 2015**
- **Where we must improve:** We need targeted outreach; many middle income families have never filled out the FAFSA

Initial Awards by Segment

	Offered Awardees	MCS Funds	Pending	New Admits	New Enrollments	Potential Funds	Total Awards (Offered + Pending)	Total MCS Funds
CSU	56,925	\$35,857,200	3,884	3,600	6,000	\$7,234,196	70,409	\$43,091,396
UC	16,006	\$17,828,298	3,666	100	4,000	\$8,703,648	23,772	\$26,531,946
TOTAL	72,931	\$53,685,498	7,550	3,700	10,000	\$15,937,844	94,181	\$69,623,342

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UC & CSU Average Student Profile

Income	CSU	UC
Average Age	23	21
Average Income	\$85,266	\$96,542
Average Other Aid	\$108	\$685
Average MCS Award	\$628	\$1,112

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Weekly Processing

- **Enrollment files**
 - Send students not previously submitted
 - Transfers
 - Previously submitted students, but not eligible with new information
- **MCS awards** – More enrollment files, more awards
- **Payments** – submit payments online or batch
- **Corrections** – make corrections annually or term



Enrollment Files

Continue to send in your campus enrollment files!

[MCS - Data Transfer](#) [File Upload](#) [Report Download](#)

File Upload

- File Type must be .txt.
- Enter the file path and name of your file (Use the Browse button to find your file).
- Click the Upload button to start this operation.
- If the file validation fails, no data will be uploaded. Please correct error and upload.
- Please ensure your file encoding is ANSI.

School ID 00131300

Acad Year 2014 - 2015

File Type Enrollment

Select File No file selected.

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More MCS Awards

- Will make more MCS award offers weekly
- Check you roster every Monday

[MCS - Data Transfer](#) [File Upload](#) [Report Download](#)

Report Download

- To select a report, choose the file type and click retrieve.
- To download the specific report, click the download button.



School ID

Acad Year

File Type

Month

Media



School Roster

School ID	<input type="text" value="00131400"/>	Acad Year	<input type="text" value="2014 - 2015"/>	Search ID	<input type="text" value="SSN"/>	<input type="text"/>
First Name	<input type="text"/>	Last Name	<input type="text"/>	<input type="button" value="Search"/>		

SSN	CSAC ID	Last Name	First Name	DOB
200000640	101308172	KIRK	TROY	08/11/1996
200003113	101308173	WATSON	MAURICE	01/07/1992
200029477	101308174	HARRIS	MICHAEL	09/20/1995
200031318	101308175	LE	GLORIA	02/23/1995
200036207	101308176	MARTINEZ	GARY	08/09/1994
200039108	101308177	RODRIGUEZ	JIMMY	05/16/1994
200041818	101308178	YOUNG	PATRICK	08/11/1994
200044719	101308179	YANEZ	MARK	08/09/1995
200053411	101308180	RODRIGUEZ	HERMAN	05/28/1996
200055785	101308181	YANG	JOHN	02/16/1996
200086203	101308182	ROBERTS	DAVID	01/12/1996
506066338	104124010	PORTER	SERENA	03/03/1979

Payments

Demographic Information		Annual Data	
RODRIGUEZ, JIMMY R		Open Terms:	Fall, Winter, Spring
CSAC ID:	101308177	Total Income:	\$130,000.00 <input type="text"/>
SSN No:	XXX - XX - 9108	Federal Aid:	\$0.00 <input type="text"/>
DOB:	05/16/1994	Institutional Aid:	\$0.00 <input type="text"/>
Cal Grant Award:	\$0.00	State Aid:	\$0.00 <input type="text"/>
Annual Award:	\$942.00	ISIR Tran #:	01 <input type="text"/>
Annual Tuition/Fees:	\$12,192.00	Eligibility Change:	<input type="text" value="--- SELECT ---"/> Payment History

Transaction Type: Correction ☐ Payment ☒

FALL TERM	WINTER TERM	SPRING TERM
Enrollment Status: <input type="text" value="HT or more- (Pay)"/> <input type="text" value="--- SELECT ---"/> HT or more- (Pay) Less Than HT - (Do Not Pay) Not Enrolled	Enrollment Status <input type="text" value="--- SELECT ---"/>	Enrollment Status <input type="text" value="--- SELECT ---"/>
Term Award Amount [\$314.00]	Term Award Amount [\$314.00]	Term Award Amount [\$314.00]
Adj. Reason Code <input type="text" value="--- SELECT ---"/>	Adj. Reason Code <input type="text" value="--- SELECT ---"/>	Adj. Reason Code <input type="text" value="--- SELECT ---"/>
Amount Paid/Verified \$ 314.00	Amount Paid/Verified <input type="text"/>	Amount Paid/Verified <input type="text"/>
Tuition/Fees [\$4,064.00]	Tuition/Fees [\$4,064.00]	Tuition/Fees [\$4,064.00]
Federal Aid [\$0.00]	Federal Aid [\$0.00]	Federal Aid [\$0.00]
Institutional Aid [\$0.00]	Institutional Aid [\$0.00]	Institutional Aid [\$0.00]
State Aid <input type="text"/>	State Aid <input type="text"/>	State Aid <input type="text"/>



CORRECTIONS Process

General Rules

- Corrections completed prior to submitting payment transaction information
- Submit Annual Level changes before Term Level changes
- Submit Term Level changes before payment transactions

*Note: For each student, you may only submit Annual Level **OR** Term Level changes within the same week as the system will recognize only the most recent submission.*



Methods For Corrections

There are two methods for submitting corrections:

- (1) Batch file uploads
- (2) On-line MCS Roster

Note: Both methods are processed at the end of the week they are submitted. Corrected information/files will be available the following Monday.

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Requirements Batch Files

Batch file correction must-haves:

- Field 42 (Transaction Type) must be marked with a "C" to indicate the record is a "correction"
- Field 41 (XX) must be used to indicate Annual Level changes
- Field 22/29/36 must be used for the corresponding terms when submitting Term Level changes

Correction

Middle Class Scholarship - Online Payment Roster

Demographic Information		Annual Data	
RODRIGUEZ, JIMMY R		Open Terms:	Fall, Winter, Spring
CSAC ID:	101308177	Total Income:	\$130,000.00
SSN No:	XXX - XX - 9108	Federal Aid:	\$0.00
DOB:	05/16/1994	Institutional Aid:	\$0.00
Cal Grant Award:	\$0.00	State Aid:	\$0.00
Annual Award:	\$942.00	ISIR Tran #:	01
Annual Tuition/Fees:	\$12,192.00	Eligibility Change:	Eligibility
		Payment History	

Transaction Type: Correction

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Reports

- **Enrollment file report** – summary of enrollment files accepted, exceptions
- **Roster file** - serves dual purposes
 - **Output** – CSAC provides MCS award information
 - **Input** – Campus provides payments and correction
- **Accept/Reject report** – summary of payment transactions
- **Payment activity report** – Weekly account activity for reconciled payments, adjustments and disbursements



Resources

www.csac.ca.gov

Colleges

MCS



<http://www.csac.ca.gov/doc.asp?id=1481>

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Recommendations

- **Expansion of Cal SOAP** regions (BCP being considered by the Governor)
- **Partner with CSBA and CCBE** for targeted outreach and training to schools/districts
- **Targeted Outreach** to middle income families
- **Joint Outreach** with CSU and UC



Thank You for Attending!

Institutional Support

1-888-294-0153

schoolsupport@csac.ca.gov